

How accountants create more value

The logo for Eclipse Online is centered within a dark purple circular frame. It features the word "ECLIPSE" in a bold, white, sans-serif font, with a yellow crescent moon graphic positioned behind the letter "L". Below "ECLIPSE" is the word "ONLINE" in a smaller, white, sans-serif font. The background of the entire page is a composite image: a hand on the left is illuminated with a blue glow and contains a small white sphere, while a hand on the right is illuminated with a warm orange glow and contains a bright yellow sun. The background is filled with abstract light trails and bokeh effects.

ECLIPSETM
ONLINE

CONSOLIDATED REPORTING | SMSF INTEGRATION | TAX COMPLIANT | ACCOUNTANT FRIENDLY



THE INVESTMENT UNIVERSE IS EXPANDING, DON'T LEAVE YOUR CLIENTS LOST IN SPACE...

Why accountants should book their clients on board the e-Cclipse UMA

Combining the latest technological can-do with sophisticated industry know-how, e-Cclipse offers investors a unique way to manage their portfolios at maximum tax efficiency.

We call e-Cclipse a Unified Managed Account (UMA) because it has the power to bring together all clients' investment assets under the aegis of a single, online system.

As well as providing the ideal base for clients' direct equity holdings, the e-Cclipse UMA has the ability to manage all other asset classes with ease – including our proprietary range of Managed Accounts that give investors access to professional funds management expertise without forfeiting legal ownership of their assets.

The e-Cclipse UMA revolves around a high interest cash-management hub that allows clients to manage cash flows effectively across their entire portfolios.

In addition, the e-Cclipse UMA can incorporate reporting data for most client assets that lie outside the system's transactional orbit including direct property holdings.

Crucially, e-Cclipse looks at the world from the clients' perspective and, unlike the existing institutionally-dominated investment platforms, promises transparency and price-savings at every point along the chain.

But while e-Cclipse has been designed to give investors greater control of their assets, the service also lends itself perfectly for use in collaboration with their trusted advisers.

For instance, the e-Cclipse UMA includes many features that can ease the tax-reporting workload of accountants without compromising accuracy and compliance.

10 WAYS THE e-CLIPSE UMA CAN ADD VALUE TO YOU AND YOUR CLIENTS.

- 10 Universal view:** clients can grant accountants view-only access to their e-Clipse account, giving a full picture of their clients' investments and tax situation at any time – all investments and fees charged are fully transparent;
- 9 Total tax reporting, complete data capture:** e-Clipse provides comprehensive tax reports for all assets while every transaction is accurately recorded with all legal information, including contract notes, available;
- 8 Permanent storage:** what happens on e-Clipse, stays on e-Clipse - forever;
- 7 Dividends directed:** e-Clipse accrues dividends and reconciles the amount due to the client bank account to ensure all dividends due are received as either cash or a share allocation in the case of dividend reinvestment plan;
- 6 Excel exportable:** e-Clipse reports are seamlessly transferred to accountants' spreadsheets;
- 5 SMSF-friendly:** the system links to most SMSF software packages;
- 4 Family portraits:** e-Clipse can provide consolidated data, and discounted pricing, for all family members who have accounts on the system;
- 3 Choice of service level:** the client determines who manages each component of their portfolio and how e-Clipse interacts with their advisers;
- 2 Full security:** most assets are owned directly by client;
- 1 Low cost:** e-Clipse has stripped out costs across the platform and as scale benefits accrue these will also be passed onto clients.



E-CLIPSE™
ONLINE

Increase the performance of your clients investment portfolio exponentially with e-Clipse online



This brochure has been developed to give a broad overview of the e-Clipse service.

Please refer to the information brochure for further detail.



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